Guidance for creating a meeting retention schedule

What is a records retention schedule?

A retention schedule lists the types of records your meeting deals with, and how to manage them. It will outline:

1. Your legal requirements for retaining or destroying records.
2. The requirements of the Society of Friends for retaining records.
3. The public access requirements for your records.
4. The correct format to keep the record in (paper or digital).

Why should your meeting create a retention schedule?

It is an important exercise for your meeting to carry out to ensure you have understood all the types of records you are managing, and what your legal requirements are for those records.

Now that many meetings are creating and managing digital records, it is a great time to carry out this exercise, to focus the meeting on its' responsibilities and to examine your working processes.

It is also a very handy document, providing a quick reference point, for when you are unsure how to treat documents. It gathers a lot of different information into one easy-to-understand table, which is very useful to pass on to members new to clerical or administrative roles.

You can tailor the schedule to your specific needs, and have one for Area, and Local level.

We have created a template with this guide to show you what it should look like – it is not comprehensive, but we have tried to pinpoint some key areas where there is legislation on how long records must be retained:

Personal Data (Data Protection Act (1998))

Financial Data

Building and premises documentation

Employment (Equality Act (2010))

For further guidance there is a lot of information, including example retention schedules on the National Archives records management site here:
http://www.nationalarchives.gov.uk/information-management/manage-information/policy-process/disposal/

You will also find many organisations publish their retention schedules online. For more information, and if you would like to see copies of BYM retention schedules, contact Lisa McQuillan (Records Manager & Deputy Archivist (lisam@quaker.org.uk).